FISCAL YEAR 2002-03

ATTENDANCE SOFTWARE—COUNTY LOGON SUPPLEMENT TRAINING GUIDE

SOFTWARE VERSION 2002-2.05

CALIFORNIA DEPARTMENT OF EDUCATION

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1.0 Introduction

This document is a supplement to the *2002-03 Attendance Software Training Guide*. It is designed to instruct you on the functionality of the 2002-03 Attendance Software—County Logon Supplement used by County Offices of Education to enter County attendance, enter tax data, and to aggregate data from County Auditors, school districts and charter schools. This guide covers only those functions available for County and County Auditor/Superintendent users. For additional lessons on the software, please refer to the *2002-03 Attendance Software Training Guide and the 2002-03 Tax Software Training Guide*.

1.1 ABOUT THIS TRAINING GUIDE

1.1.1 AUDIENCE

This training guide is designed for the County Offices of Education who will be using the Attendance Software to enter County attendance, enter tax data, and to aggregate attendance and tax data.

1.1.2 PREREQUISITES

To ensure your success, we recommend that you first take a course in *Microsoft Windows* or have equivalent knowledge of the basic concepts of the *Windows* environment.

1.1.3 USING THIS GUIDE

You will use this guide as you complete each lesson's tasks. You can also use this guide as a quick reference for particular procedures.

1.1.4 TRAINING GUIDE DESCRIPTION

This training guide allows you to build upon each skill with tasks learned in previous lessons.

1.1.5 TRAINING GUIDE CONTENTS

Each chapter contains lessons with objectives, explanations, and guided hands-on activities for you to follow.

1.1.6 DOCUMENT CONVENTIONS

This document uses the following conventions to describe functions and procedures in the software:

Window Names	The names of windows, screens, and dialogue boxes use title case, such as: Save As window User Information screen
Commands	Commands are operations you must follow in order to perform certain functions in the Attendance Software. Bold face font is used, such as: Select **Print** from the **File** menu Click the **OK** button
Key Commands	Key commands are operations for pressing particular keyboard keys rather than a button on a screen. Keys are represented as Press the `Tab→` key. Press `Enter`.

1.2 FORM CROSS REFERENCE

The following table is a cross-reference of the old form numbers to the new entry screen names:

Old Form Number	New Entry Screen Name
School District	
J-18/19	Attendance School District
J-18/19B	Attendance Basic Aid “Choice” District
J-18/19S	Attendance Supplement SD
J-7	Class Size Penalties SD
J-22	Handicapped ROC/P
J-22 Supplement	Gifted and Talented Education
Schedule F - Elementary	Necessary Small Elementary School – ADA
Schedule F – High School	Necessary Small High School – ADA
Schedule E	New Necessary Small Continuation High School – ADA
J-12	High-Risk Youth Education and Public Safety Program
Form R.1	Small High School ROC/P ADA/Service Allocation
Charter School	
J-18/19CH/BG and J-18/19CH/BG/U	Attendance Charter School Block Grant
J-18/19CH	Attendance Charter School – Revenue Limit
N/A	Attendance County Operated Charter Schools Program COE
J-27/28 CH/BG	Attendance Charter School Block Grant COE
Schedule CH/BA	Basic Aid Supplement Charter School
J-18/19CH/E	Educationally Disadvantaged Pupil Data
J-27/28 CH/COE	Attendance COE Charter School – Revenue Limit
County	
J-27/28	Attendance COE
J-18/19C	Attendance County Operated Programs COE
J-22	Gifted and Talented Education
J-12	High-Risk Youth Education and Public Safety Program

Old Form Number	New Entry Screen Name
N/A	Handicapped ROC/P
R.1	Small High School ROC/P ADA/Service Allocation
County Auditor / Superintendent	
J-29B/J-29C	Taxes
J-29.1	Miscellaneous Funds

2.0 Lesson 1—Software Installation

Lesson Objectives

To learn how to properly install the Attendance Software—County Logon Supplement, you will:

A Install the software from CD-ROM.

B Learn about other methods of installation.

C Learn how to change the screen resolution on your monitor.

2.1 INSTALLING THE SOFTWARE

In this section, you will learn how to install the software from the Internet and CD-ROM. This section describes the software installation for Windows 95, 98, ME, NT, 2000 and XP. For more detailed instructions, please refer to the *Attendance Software Installation Guide*.

Note: Windows 95 and 98 users must install DCOM before installing the Attendance Software.

Downloading & Installing DCOM from Internet Explorer

Note: Only Windows 95 and 98 users must install DCOM.

1. Navigate to http://www.cde.ca.gov/fiscal/software/.
2. Click on the correct DCOM link. The File Download dialog box displays.
3. Select Save this file to disk.
4. Click **OK**. The Save As dialog box displays.
5. Select a location to save the file. (For example, you might save your file to the Desktop so you may quickly find it.)
6. Click **Save**.
7. While the application file is downloading to your computer, ensure that the **Close this dialog box when download completes** checkbox is *unchecked*.

   Note: If the box is checked, the download dialog box closes immediately after the download completes. You must find the file that was downloaded and double click on the file to continue to step 9.

8. When this download is complete, the Download Complete dialog box displays.
9. Click **Open**. The DCOM dialog box displays.
10. Click **Yes**. The End User License Agreement window displays.
11. Click **Yes**. The program copies the files to the computer, and then the Restart dialog box displays.
12. Click **Yes** to restart your computer.

    Note: You must restart your computer in order for DCOM to successfully install and before you attempt to install the Attendance Software.

2.1.1 TASK: INSTALLING THE SOFTWARE FROM THE INTERNET

☐ Objective: To successfully install the Attendance Software—County Logon Supplement using the Internet to download the install package.

	What you do	*Comments/Prompts*
1.	Click the Windows **Start** Start button, select **Programs**, then **Internet Explorer.**	The web browser opens.
2.	Navigate to http://www.cde.ca.gov/fiscal/software/	The SFSD Software –Downloadable page displays.
3.	Find the AttSupp2002-2_05.exe file on the Attendance Software—County Logon Supplement section of the web page.	Note: The software version number may change. The website will contain the most recent version of the software.
4.	Right click the AttSupp2002-2_05.exe and select **Save Target As** from the command window.	Note: Users with computers running Windows NT must select the AttSuppNT2002-2_05.exe file.
5.	Select **Desktop** in the **Save in** drop-down list.	The AttSupp2002-2_05.exe should be showing in the **File Name** field.
6.	Click **Save.**	The file is saved to your desktop.
7.	Click the Windows **Start** Start button.	
8.	Select **Run**.	The **Run** dialog box displays.
9.	Click **Browse**.	The **Browse** dialog box displays.
10.	Click the **Look in** drop-down arrow at the top of the dialog box.	
11.	Select Desktop in the **Look in** drop-down list.	

12.	Select the AttSupp2002-2_05.exe file, and click **Open.**	
13.	Click **OK** in the Run dialog box.	The self-extract utility and installation process begins. The necessary files copy to your computer. A dialog box may display that informs you that setup cannot continue because some system files are out of date. Update these files by clicking **OK**. Once the program has installed the setup initialization files, the Attendance Software Setup window displays.
14.	Click **OK**.	The Attendance Software—County Logon Supplement Setup dialog box displays.
15.	Click the computer icon button.	It is ***highly*** recommended that you accept the default directory but you can change the directory by clicking **Change Directory** and then entering or selecting the desired directory in the dialog box. The **Choose Program Group** dialog box displays
16.	Click **Continue**.	If you want to give the group a different name, type a name or description in the text box and then click **Continue**. It is suggested that you accept the default program group. The progress meter displays the installation status. When the progress bar reaches 100%, the window closes, and the dialog box displays that the software setup completed successfully.
17.	Click **OK**.	

2.1.2 TASK: INSTALLING THE SOFTWARE FROM CD-ROM

☐ Objective: To successfully install the Attendance Software—County Logon Supplement from a CD-ROM.

	What you do	***Comments/Prompts***
1.	Insert the CD-ROM into the CD-ROM drive.	
2.	Click the Windows **Start** Start button.	
3.	Select **Run**.	The **Run** dialog box displays.
4.	Click **Browse**.	The **Browse** dialog box displays.
5.	Click the **Look in** arrow at the top of the dialog box.	
6.	Click the drive letter associated with your CD-ROM.	
7.	Select the AttSupp2002-2_05.exe file, and Click **Open.**	Note: Users with computers running Windows NT must select the AttSuppNT2002-2_05.exe file.
8.	Click **OK** in the Run dialog box.	The self-extract utility and installation process begins. The necessary files copy to your computer. A dialog box may display that informs you that setup cannot continue because some system files are out of date. Update these files by clicking **OK**. Once the program has installed the setup initialization files, the Attendance Software Setup window displays.
9.	Click **OK**.	The Revenue Software Setup dialog box displays.

10.	Click the computer icon button.	It is ***highly*** recommended that you accept the default directory but you can change the directory by clicking **Change Directory** and then entering or selecting the desired directory in the dialog box. The **Choose Program Group** dialog box displays
11.	Click **Continue**.	If you want to give the group a different name, type a name or description in the text box and then click **Continue**. It is suggested that you accept the default program group. The progress meter displays the installation status. When the progress bar reaches 100%, the window closes, and the dialog box displays that the software setup completed successfully.
12.	Click **OK**.	

2.2 OTHER INSTALLATION METHODS

Additionally, users may install the software from floppy disk. However, installation from floppy disks is cumbersome. If floppy disk is the only alternative (e.g. user computer has no internet connection and no CD-ROM drive), the affected user should contact CDE for a set of floppy disks. Instructions, and the disks, are available only on a case-by-case basis from CDE.

2.3 CHANGING MONITOR RESOLUTION

You may want to make sure your computer display is set for optimal performance of the Attendance Software. The software is optimized for 800 x 600 pixel resolution, although higher resolutions, such as 1024 x 768 pixels, are acceptable.

Note: Changing the display size affects how other software programs display on your screen.

2.3.1 TASK: CHANGING THE RESOLUTION OF YOUR MONITOR

☐ Objective: To learn how to change your monitor's screen resolution.

	What you do	***Comments/Prompts***
1.	Make sure all your windows are minimized so your Desktop displays.	
2.	Right-click on your Desktop.	
3.	Select **Properties** from the pop-up menu.	
4.	Select the **Settings** tab in the **Display Properties** dialog box.	
5.	Under **Screen area**, move the slider until the pixel resolution is **800 X 600 pixels**.	If you are changing the resolution on a Windows 95 or NT computer the slider is under the **Desktop area**. Observe how images and text expand or contract, depending on the settings you choose.
6.	Click **OK**.	

Notes:

3.0 Lesson 2—Software Startup

Lesson Objectives

To become familiar with the Attendance Software-County Logon Supplement, you will:

A Learn how to start the application.

B Learn how to check the software version.

3.1 STARTING THE SOFTWARE

To run the Attendance Software—County Logon Supplement, follow the steps outlined below:

3.1.1 TASK: PRACTICE OPENING THE SOFTWARE

☐ Objective: To learn how to initialize the software.

	What you do	***Comments/Prompts***
7.	Click the **Start** button.	
2.	Click **Programs**.	The **Programs** menu expands.
3.	Select **Attendance Software** from the **Programs** menu.	
4.	Select **Attendance Software—County Logon Supplement 2002-03 V2.05** from the submenu.	The Logon entry screen displays.

3.2 VERSION CHECKING

Version checking is an important method used to ensure you are using the correct version of the software. When you open the software, the Logon screen displays the version number in the bottom left corner of the screen.

Check the version number on the CDE Web site (http://www.cde.ca.gov/fiscal/software) to ensure you are using the correct software for data collection.

3.2.1 TASK: LEARN HOW TO CHECK THE SOFTWARE VERSION

☐ Objective: To determine if you are using the correct version of the attendance software

	What you do	*Comments/Prompts*
1.	Display the logon screen.	
2.	Notice the version number.	If the version number does not match the number on the CDE web site, follow the instructions in your *Attendance Software Installation Guide* for downloading software from the Internet.

Notes:

4.0 Lesson 3—Logging On/Off

Lesson Objectives

To begin using the software as a County user, you will:

A Add new users to the system for different user types.

B Get the latest database updates.

C Log on to the system.

D Logoff and exit the system

4.1 ADDING A NEW USER

You can add one or more users to the Attendance Software—County Logon Supplement. Types of users fall under four categories: School District, Charter School, County Office, and County Auditor.

For purposes of this training guide you will learn how to add a County Office and County Auditor user. For information on adding other users, please refer to the *2002-03 Attendance Software Training Guide and 2002-03 Tax Software Training Guide*.

4.1.1 TASK: ADD A NEW COUNTY USER

☐ Objective: To learn how to add a user for a county.

	What you do	***Comments/Prompts***
1.	Start the Attendance Software—County Logon Supplement.	The Logon screen displays.
2.	Click the **New User** button.	The New User entry screen displays.
3.	Type *County Office* in the **Contact Name** field. Press Tab→	
4.	Select **County Office** from the **User Group** drop-down list. Press Tab→	
5.	Select **Alameda** from the **County** drop-down list. Press Tab→	Some fields are disabled when you create a County Office user (for example, the **School District** field.)
6.	Enter (555) 555-5555 (x) 5555 in the **Phone** field.	The phone extension, **Fax,** and **E-Mail** fields are not required. To save time during training, we will not enter data in either the **Fax** or **E-mail** fields.
7.	Click **OK**.	The Logon screen displays again with the new user you entered in the **Please Select User** dialog box.

4.1.2 TASK: ADD ADDITIONAL USERS

☐ Objective: To add additional users to the system using the steps you learned in the previous task.

	What you do	***Comments/Prompts***
1.	Add a Small County User	**Contact Name** = Small County **User Group =** County Office **County** = Glenn
2.	Add a Charter Block Grant County User	**Contact Name** = County Charter **User Group =** County Office **County** = Los Angeles
3.	Add a County GATE User	**Contact Name =** County GATE **User Group =** County Office **County =** Kings
4.	Add a County JPA User	**Contact Name =** County JPA **User Group =** County Office **County =** Siskiyou
5.	Add a County Auditor User	**Contact Name =** County Auditor **User Group =** County Auditor **County =** Alameda

4.2 GETTING THE LATEST UPDATES

You can update information (*i.e.,* grade levels, new districts, or schools) in the Attendance Software database with a CDE-supplied text data file. The CDE will supply this file upon request.

4.2.1 TASK: IMPORT A GET LATEST FILE

☐ Objective: To import a "get latest" file.

	What you do	*Comments/Prompts*
1.	Click the **Get Latest** button.	The Importing Data for Get Latest screen displays.
2.	Click **Select File**.	The Open window displays.
3.	Click the **Look in** drop-down arrow.	
4.	Find/Select the "AttendanceImport" folder on your installation CD.	
5.	Select the GetLatest0203Ver2_05.txt file.	You can close the window without importing any data by leaving the field blank and clicking the **Close** button.
6.	Click **Open.**	The Open screen closes and the import process begins. The file name and location displays in the text box in the Importing Data for Get Latest screen. The Import Complete message displays.
7.	Click **OK**.	The Status window displays.
8.	Click **OK**.	
9.	Click **Close**.	

4.3 LOGGING ON AND OFF

Now that you have added new county users to the software, you are prepared to logon.

4.3.1 TASK: LOG ON AND OFF

☐ Objective: To log on as different types of users in the software and to properly log off and exit the system.

	What you do	***Comments/Prompts***
1.	Select the *County Office* user from the **Please Select User** drop-down list in the Logon screen.	
2.	Click the **Logon** button.	The **Main Menu** window for the County User displays.
3.	Select **Logout** from the **File** menu.	The Logon screen displays. Note: When **Logout** is selected, the software returns to the Logon screen. When **Exit** is selected, the software closes.
4.	Select the *County Auditor* user.	
5.	Click the **Logon** button.	Notice the difference between the two main menus.
6.	Select **Logout** from the **File** menu.	The Logon screen displays. Note: When **Logout** is selected, the software returns to the Logon screen. When **Exit** is selected, the software closes.
7.	Click the **Exit** button.	The software closes.

Notes:

5.0 Lesson 4—Screen Navigation

Lesson Objectives

To understand the Attendance Software—County Logon Supplement environment, you will:

A Examine the Main Menu.

B View the menus and menu commands.

C Learn how to select some or all of the LEAs and entry screens for printing and exporting.

D Learn about Screen Navigation

5.1 MAIN MENU SCREENS

The Main Menu screen is the starting point in the Attendance Software—County Logon Supplement.

As a County user, you will have access to four Main Menus—the COE Attendance Main Menu, the School District Attendance Main Menu, the Charter School Attendance Main Menu, and the County Auditor Taxes Main Menu.

5.1.1 COUNTY OFFICE—COE ATTENDANCE MAIN MENU

The COE Attendance Main Menu is the default screen when you logon as a County Office.

The COE Attendance Main Menu screen displays with two grids:

County Offices of Education: The top grid contains information about the logged in county office.

Field	Description
SELECTED	Denotes selection status for printing and/or exporting data. The default selection is **No**. Change the selection to **Yes** by clicking the **Selected** cell in the appropriate district rows.
COUNTY ID	The county identification number.
DISTRICT ID	The district identification number.
SCHOOL ID	The school identification number.
COUNTY NAME	The county the district resides in.
DISTRICT NAME	The district name.
SCHOOL NAME	The school name, if any.
DISTRICT TYPE	The district type.
LOWEST GRADE	The lowest grade level offered in the district; the program displays 0 for kindergarten.
HIGHEST GRADE	The highest grade level offered in the district.

Entry Screens: The bottom grid contains a list of entry screens that you can access to view or enter county attendance data.

Field	Description
SELECTED	Denotes selection status for printing and/or exporting data. The default selection is **No**. Change the selection to **Yes** by clicking the **Selected** cell in the appropriate entry screen row.
ENTRY SCREEN NAME	The entry screen name.
CERTIFICATE NUMBER	Denotes that the data within the entry screen has been certified and has been assigned its unique certification number for transmission to your COE.
NUM RECORD	Number of records in the entry screen.
NUM ERROR	Number of errors in the entry screen.
NUM WARNING	Number of warnings in the entry screen.
LAST MODIFIED DATE	The date and time records in the entry screen were last modified and saved.
LAST EDIT CHECK DATE	The date and time the entry screen was last saved and checked for errors. Not all screens are checked for errors, but the field still contains date and time information upon saving (for example, Handicapped ROC/P).
LAST EXPORT DATE	The date and time the entry screen data was last exported to a certified data file.
LAST IMPORT DATE	The date and time that certified data was last imported into the entry screen.

5.1.2 COUNTY OFFICE—SCHOOL DISTRICT ATTENDANCE LEA MAIN MENU

When you logon as a County Office, you can change the LEA so the Main Menu screen displays school district information. the School District Main Menu screen displays with all the districts within the county listed.

The School District Attendance Main Menu screen displays with two grids:

District(s): The top grid contains all the school district information for the county.

Entry Screens: The bottom grid contains a list of entry screens that you can access to view or enter school district attendance data.

5.1.3 COUNTY OFFICE—CHARTER SCHOOL ATTENDANCE LEA MAIN MENU

When you logon as a County Office that includes charter schools, you can change the LEA so the Main Menu screen displays charter school information.

The Charter School Attendance Main Menu screen displays with two grids:

Charter School(s): The top grid contains all the charter school information for the county.

Entry Screens: The bottom grid contains a list of entry screens that you can access to view or enter charter school attendance data.

5.1.4 COUNTY OFFICE—COUNTY AUDITOR TAXES LEA MAIN MENU

When you logon as a County Office, you can change the LEA so the Main Menu screen displays county auditor information.

The County Auditor Taxes Main Menu screen displays with two grids:

County Auditor: The top grid contains information for the COE.

Entry Screens: The bottom grid contains a list of entry screens that you can access to view or enter tax data.

5.1.5 INFORMATION BAR

The bottom of the Main Menu screen contains an Information Bar that lists, from left to right, the following information:

- The Attendance Software version.
- Your user name.
- The fiscal year and selected period.
- The task you are performing (Certification).
- The current date.

If you logout and logon with a new user account, or if you change periods, the Information Bar reflects the changes.

5.2 MAIN MENU OPTIONS

Although there are no tasks associated with this portion of Lesson 4, you can review the menus by following along with your instructor as you examine each menu.

5.2.1 FILE MENU

The **File** menu contains the following commands:

Command	Description
Import	**Import** is a method by which data from another file can be imported into the Attendance Software.
Export	**Export** is the process in which the Attendance Software exports data to a text file or to a certified MDB database file.
Print	The **Print** menu allows you to print reports. There are eight commands in the **Print** menu: **Reports**, **Blank Reports**, **Certification**, **Blank Certifications**, **COE Certification**, **Summary, Status, and Certification Exception**.
Printer Setup	The **Printer Setup** command opens a standard Windows Printer Setup window. You can select the printer to which you will print reports, and the default number of copies you will print each time.
Logout	The **Logout** command logs the current user out of the application and returns to the Logon screen.
Exit	The **Exit** command closes the program and returns you to Windows.

5.2.2 PERIOD MENU

The **Period** menu allows you to switch between different reporting periods for the current fiscal year and for corrections.

There are three reporting periods for the current fiscal year (P-1, P-2, and Annual) and two reporting periods for corrections (P-2 and Annual). When you open the Attendance Software, it will always open to the last reporting period used.

5.2.3 CHANGING REPORTING PERIODS

When reporting data for the current fiscal year, select a period by selecting **P-1**, **P-2**, or **Annual** from the **Period** menu. When correcting data for a prior period, select **Corrected** from the **Period** menu, then select **P-2** or **Annual** from the sub-menu. A checkmark displays next to the selected period in the **Period** menu. The lists of entry screens available may change for the specific period.

Note: You must use the appropriate fiscal year software to make any prior year corrections. For example, you would use the 2002-2003 software in fiscal year 2003-2004 to make 2002-2003 corrections.

5.2.4 LEA MENU

The User Group selected when the account was created determines the LEA Menu choices. A County Office User Group account allows access to all LEA menu options. A School District User Group account contains both School District and Charter School LEA menu options. A Charter School User Group account contains only the Charter School option in the LEA menu. The LEA menu displays differently for school district LEAs, school district charter school LEAs, and charter school LEAs. A County Auditor User Group account contains only the County Auditor option in the LEA menu.

The Attendance Software automatically displays the LEA Menu based on the User Group. The currently selected LEA has a checkmark next to the **Attendance** or **Taxes** submenu.

5.2.5 TOOLS MENU

You can edit your user contact information by selecting **User Information** from the **Tools** menu. The User Information window displays your current user information. You can only modify the contact name, telephone number, fax number, and e-mail fields. You cannot change your user group, county, school district, or school from this entry screen. You must create a new account if you want to change this information.

You can also access contact information for other LEAs whose information you have imported. The Contact Information window displays the same information provided in the User Information window, but the information is for selected LEAs. To display the contact information for an LEA, click the SELECTED column cell of the LEA in the top grid. From the **Tools** menu, select **Contact Information** to display the **Contact Information** window.

COEs can upload certified data files to the CDE by using the Upload Certified Data function. CDE requires that they receive electronic data files in order to process and certify the Principal Apportionment. For more information about uploading certified data files, see Lesson 11.

5.2.6 HELP MENU

The **Help** menu is a useful tool if you need assistance with a particular entry screen or program function.

Clicking **Help** or pressing the F1 key displays the Help window. Some areas of help include assistance for screens, deadline information, and general software help.

Clicking **About** displays the version number of the software, similar to the Logon Window. To return to the Attendance Software, click **OK**. If you would like to view your Windows system information, click **System Info**. The System Information window displays information about your hardware, software, and Windows environment.

5.3 SELECTING LEAS AND ENTRY SCREENS

5.3.1 TASK: SELECTING ALL LEAS AND ENTRY SCREENS

☐ Objective: To learn how to select and deselect all LEAs and entry screens for printing and exporting.

	What you do	*Comments/Prompts*
1.	Start the Attendance Software—County Logon Supplement.	The Logon screen displays.
2.	Logon as the *County Office* user.	The Main Menu opens.
3.	Select **School District** from the **LEA** menu, then **Attendance** from the sub-menu.	
4.	Click the **Select All** button in the **District(s)** grid.	All LEAs' **Selected** column cells change to "Yes".
5.	Click the left-arrow in the **District (s)** grid.	
6.	Click the **Select All** button in the **Entry Screens** grid.	All cells in the **Selected** column change to "Yes". All entry screens for all LEAs can be exported or printed.
7.	Click the **Deselect All** button in the **Entry Screens** grid.	All cells in the **Selected** column change to "No".
8.	Click the **Deselect All** button in the **District (s)** grid.	All LEAs' **Selected** column cells change to "No".
9.	Select **File, Logout** from the Main Menu screen to logout.	The Logon screen displays.

5.3.2 TASK: SELECTING INDIVIDUAL LEAS OR ENTRY SCREENS

☐ Objective: To learn how to select individual LEAs or entry screens for printing and exporting.

	What you do	***Comments/Prompts***
1.	Logon as the *County Office* user.	The Main Menu opens.
2.	Select **School District** from the **LEA** menu, then **Attendance** from the sub-menu.	
3.	Click the **Selected** column cell of an LEA and change it to “Yes”	
4.	Click the left-arrow in the **District (s)** grid.	You can now select a program in the **Entry Screens** grid.
5.	Click the **Selected** column cell of any program in the **Entry Screens** grid.	You can now print a report or export data for that program and that LEA.
6.	Select **File, Logout** from the Main Menu screen to logout.	The Logon screen displays.

5.4 ENTRY SCREEN NAVIGATION

Although there are no tasks associated with this portion of Lesson 4, you can follow along with your instructor as you examine each item.

5.4.1 ACCESSING ENTRY SCREENS

Clicking on a row in the Entry Screens section of the Main Menu opens the entry screen for data entry.

The data is entered into “cells”. Some cells may be disabled (grayed out). These disabled cells are used to show calculated values or to prevent a user from entering data that does not apply.

5.4.2 MOVING THROUGH FIELDS

You can move to a different field in three different ways. You can press the `Tab` key, `Enter` key, or you can move the mouse pointer over the field you want and then click the left mouse button. You can move to the previous field by pressing `Shift + Tab`. The program highlights the value in that field once the cursor displays there. If the next field does not display in the window, the program scrolls up or down the entry screen to display your selected field.

5.4.3 MULTIPLE RECORD ENTRY SCREENS

Some entry screens allow multiple records to be created. Select an existing record, add a new record, or delete the currently selected record by clicking on one of the following buttons:

Button/Function	Description
⏮	Moves to the first record.
◀	Moves to the previous record.
▶	Moves to the next record.
⏭	Moves to the last record.
Add New	Adds a new record.
Delete	Deletes the currently selected record.

5.4.4 SWITCHING BETWEEN TABBED AND DROP-DOWN MENUS

Each entry screen contains one or more tabs. These tabs display in a row at the top of the entry screen. If an entry screen has more than one tab, you can move to each entry screen by clicking on the tab. After you click the tab the entry screen displays.

At the end of the tab row the **Drop-Down Menu** button (☰) displays. When you click this button the tab menu changes to a text field showing the name of the currently selected tab with an arrow to the right.

You can view each tab by clicking on the drop-down arrow and then selecting an entry screen from the drop-down list. You can revert back to tab view by clicking on the **Tabs** button ().

5.4.5 FILE MENU

Clicking on the **File** menu in the entry screen displays the following commands:

- Save
- Check/Save
- Print
- Printer Setup
- Close

The **Save**, **Check/Save**, and **Close** options are also available as buttons at the bottom of the entry screen.

Command	Description
Save Save	When you enter data into an entry screen you must save the data you entered. All entry screens let you save data by selecting the **Save** option or by clicking the **Save** button.
Check/Save Check/Save	After you finish entering data into an entry screen, you must check the data to ensure that your data has no errors and is exportable to your COE. When you select the **Check/Save** option, the data is saved and checked for errors. **NOTE**: Not all entry screens have the Check/Save option and button enabled, such as the School District Handicapped ROC/P entry screen. When you save data in an entry screen that does not perform a certification check, the program generates the certification automatically so you can export the data.
Print	Clicking **File**, then **Print** displays a report of the data entered into a particular entry screen. The report can be printed by clicking on the printer icon in the upper left-hand corner of the window. The report will print using the default printer installed in your Windows application. All reports will print on standard 8 ½″ × 11″ paper. To track revisions, each printed report will display the date and time of printing.
Printer Setup	Clicking **File**, then **Printer Setup** opens a standard Windows Printer Setup window. You can select the printer to which you will print reports, and the default number of copies you will print each time.
Close Close	The **Close** command or button closes the entry screen and returns you to the Main Menu.

5.4.6 NOTE MENU

If you want to include notes with the data for your County Office of Education or the CDE to refer to, you can add notes by selecting **Add Note** from the **Note** menu.

After you finish typing your note, click one of the following buttons at the bottom of the window as shown in the table below.

Button	Description
Save	This button saves the note with your data. Every time you open the screen your note displays when you open the Notes window.
Cancel	Removes text that you entered after you opened the window. If you saved text in the window, the program does not remove that saved text.
Delete	Deletes all text in the Notes window. When you click **Delete** a dialog box displays asking if you want to remove the text; when you click **Yes** the program deletes the text and you cannot retrieve it.
Close	Closes the Notes window.

After you save your note and then save the data in the associated entry screen, you can view the saved note every time you access the Notes window.

5.4.7 HELP MENU

If you need assistance for a particular entry screen, click **Help** from the **Help** menu of that entry screen.

5.4.8 DELETE BUTTON

If you want to remove all data from all fields in the entry screen and start over, click the **Delete** button. Once you delete the data you cannot retrieve it.

5.4.9 CANCEL BUTTON

If you click the **Cancel** button, all data that has not been saved will be cleared. The data reverts back to the last saved data, or to zero if no data was previously saved.

Notes:

6.0 Lesson 5—Entering County Attendance

Lesson Objectives

To understand the County Attendance entry screens, you will:

A Enter data in each of the county attendance entry screens

6.1 ENTERING COUNTY ATTENDANCE

Now that you have learned how to log on and are familiar with the navigation of the software, you will enter data into the County attendance entry screens.

6.1.1 TASK: ENTER DATA IN THE ATTENDANCE COE ENTRY SCREEN

☐ Objective: To enter Attendance COE data.

	What you do	***Comments/Prompts***
1.	Logon as the *Small County* user.	The Main Menu opens.
2.	Select **P-2** from the Period menu.	
3.	Click the left-arrow in the **County Offices of Education** grid.	
4.	Click the left-most column cell in the **Attendance COE** row in the **Entry Screens** grid.	The Attendance COE entry screen displays. Notice that the screen displays three screen tabs, and that the Elementary and High School screen tab is automatically displayed.
5.	Enter numbers into each field on the **Elementary and High School** tab, pressing the Tab→ key to move between fields. Try using the period . key to apply decimal amounts to ADA.	Use any numbers. If you click Check/Save and the data is wrong, you will be able to view the corrections you need to make in the Edit Check Report. Notice that every entry field in this screen tab is related to ADA except Lines A-16 and A-17; Hours are entered into these entry fields, not ADA.
6.	Click **Save**.	
7.	Click on the **ROC/P, Adults and CalWORKS** tab, continuing to add data.	

8.	Click the **Adult Ed. Allocation** button.	The Adult Education COE entry screen is displayed. If this is the first time you are entering data in this entry screen, a message displays reminding you to click the **Add New** button to add a new record. If there are records present, then you will not be prompted to add a new record.
9.	Click **OK**.	
10.	Click the **Add New** button.	The Add New Record window displays. Notice that you cannot select a county from the County of Residence drop-down list.
11.	Select a district from the District of Resident drop-down list.	The selected district name displays.
12.	Click the **Add Record** button.	
13.	Enter ADA into the **Adult Education ADA** field.	
14.	Click **Save**.	You can add multiple Adult Education COE records by clicking the Add New button and repeating Steps 10-14.
15.	Click **Close** to return to the Attendance COE entry screen.	Notice the ADA you entered is also displayed in line B-4 of the **ROC/P, Adults and CalWORKS** tab. Line B-4 in the **ROC/P, Adults and CalWORKS** tab displays a total of all ADA entered in the Adult Education COE entry screen.
16.	Click on the **Supplemental Instructional Hours and Other** tab, continuing to add data.	Notice that on the **Supplemental Instructional Hours and Other** tab hours and ADA are used.

17.	Click **Check/Save**.	Depending on the data entered, either the Edit Check Report window displays, or a message stating “The data has passed the edit check process” displays.
18.	Click the ☒ button in the Edit Check Report window, or the OK button on the message.	The entry screen is displayed.
19.	Click **Save**.	
20.	Close the Attendance COE entry screen.	Notice the changes to the Attendance COE row in the Entry Screens grid of the main menu.
21.	Select **File**, **Logout** from the Main Menu screen to logout.	The logon screen displays.

6.1.2 TASK: ENTER DATA IN THE ATTENDANCE COUNTY OPERATED PROGRAMS COE ENTRY SCREEN

☐ Objective: To enter Attendance County Operated Programs COE data.

	What you do	*Comments/Prompts*
1.	Logon as the *County Office* user.	The Main Menu opens.
2.	Select **P-2** from the Period menu.	
3.	Click the left-arrow in the **County Offices of Education** grid.	
4.	Click the left-most column cell in the **Attendance County Operated Programs COE** row in the **Entry Screens** grid.	The Attendance County Operated Programs COE entry screen displays. If this is the first time you are entering data in this entry screen, a message displays reminding you to click the **Add New** button to add a new record. If there are records present, then you will not be prompted to add a new record.
5.	Click **OK**.	
6.	Click the **Add New** button.	An **Add New Record** window displays. Notice that the logged on county is already displayed in the **County of Residence** drop-down list. **Note**: You can still change the selection in the **County of Residence** drop-down list.
7.	Select a county from the **County of Residence** drop-down list.	The selected county name displays.
8.	Select a district from the **District of Residence** drop-down list.	The selected district name displays.

9.	Click the **Add Record** button.	
10.	Enter numbers into each field pressing the Tab→ key to move between fields. Try using the period . key to apply decimal amounts to ADA.	
11.	Click **Save**.	Notice that the sum of the previous cells displays in the **Total ADA** cell when you save the record. You can add multiple Attendance County Operated Programs COE records by clicking the **Add New** button and repeating steps 6-11.
12.	Click **Close** to return to the Main Menu screen.	
13.	Select **File, Logout** from the Main Menu screen to logout.	The Logon screen displays.

6.1.3 TASK: ENTER DATA IN THE GIFTED AND TALENTED EDUCATION ENTRY SCREEN

☐ Objective: To enter Gifted and Talented Education data.

	What you do	***Comments/Prompts***
1.	Logon as the *County GATE* user.	The Main Menu opens.
2.	Select **P-2** from the Period menu.	
3.	Click the left-arrow in the **County Offices of Education** grid.	
4.	Click the left-most column cell in the **Gifted and Talented Education** row in the **Entry Screens** grid.	The Gifted and Talented Education entry screen displays.
5.	Click in the checkbox.	A checkmark displays.
6.	Click **Save**.	
7.	Click the **Charter School** button.	The GATE - Schools List screen displays. **Note**: Only Revenue Limit Funded charter schools will be displayed in the list.
8.	Click on an LEA in the **List of Eligible Charter School(s)** box.	
9.	Click the > button.	The selected LEA is moved to the **List of Participating Charter School(s) in GATE** box.
10.	Holding the Ctrl key down, click on several more LEAs in the **List of Eligible Charter School(s)** box.	

11.	Click the > button.	The selected LEAs are added to the **List of Participating Charter School(s) in GATE** list.
12.	Click the << button.	Notice that all the LEAs move back to the **List of Eligible Charter School(s)** box. Practice moving LEAs back and forth between the two boxes.
13.	Click the >> button to ensure that all LEAs are copied to the **List of Participating Charter School(s) in GATE** list.	
14.	Click the **Add/Update Charter School(s)** button.	A message displays, showing that the save operation has been completed.
15.	Click **OK**.	
16.	Click **Close**.	The window closes and you are returned to the GATE entry screen.
17.	Click **Close** to return to the Main Menu screen.	Notice that four records are displayed in the GATE row—one for checking the box, and one for each charter school added.
18.	Select **File, Logout** from the Main Menu screen to logout.	The Logon screen displays.

6.1.4 TASK: ENTER DATA IN THE HIGH-RISK YOUTH EDUCATION AND PUBLIC SAFETY PROGRAM ENTRY SCREEN

☐ Objective: To enter High-Risk Youth Education and Public Safety Program data.

	What you do	***Comments/Prompts***
1.	Logon as the *County Office* user.	The Main Menu opens.
2.	Select **P-2** from the Period menu.	
3.	Click the left-arrow in the **County Offices of Education** grid.	
4.	Click the left-most column cell in the **High-Risk Youth Education and Public Safety Program** row in the **Entry Screens** grid.	The High-Risk Youth Education and Public Safety Program entry screen displays.
5.	Enter numbers into each field on the **First Time Offenders** tab, pressing the Tab→ key to move between fields.	Use any combination of numbers—if they are wrong, you will be able to view the corrections you need to make in the Edit Check Report.
6.	Click on the **Transitioning Youth** tab, and continue to add data.	
7.	Click **Save**.	
8.	Click **Close** to return to the Main Menu screen.	
9.	Select **File, Logout** from the Main Menu screen to logout.	The Logon screen displays.

6.1.5 TASK: ENTER DATA IN THE SMALL HIGH SCHOOL ROC/P ADA/SERVICE ALLOCATION ENTRY SCREEN

☐ Objective: To allocate ROC/P attendance data to small school districts.

	What you do	*Comments/Prompts*
1.	Login as the *Small County* user.	The Main Menu opens.
2.	Select **P-2** from the **Period** menu.	
3.	Click the left-arrow in the **County Offices of Education** grid.	
4.	Click the left-most column cell in the **Small High School ROC/P ADA/Service Allocation** row in the **Entry Screens** grid.	The Small High School ROC/P ADA/Service Allocation entry screen opens. A message displays that tells you if change the Attendance COE data, you must revalidate the Small High School ROC/P ADA/Service Allocation. If this is the first time you are entering data in this entry screen, a message displays reminding you to click the **Add New** button to add a new record. If there are records present, then you will not be prompted to add a new record.
5.	Click **OK** to close both message boxes.	
6.	Click the **Add New** button.	An **Add New Record** window displays. The ROC/P drop-down list field is disabled and displays the selected ROC/P name.
7.	Select a district from the **School District** drop-down list.	The selected district name displays.

8.	Select a school from the **Small High School** drop-down list.	The selected school name displays.
9.	Click the **Add Record** button.	
10.	Enter numbers into each field, pressing the Tab→ key to move between fields.	Use any combination of numbers—if they are wrong, you will be able to view the corrections you need to make in the Edit Check Report. Notice that some fields in the tabs are disabled because the information does not apply.
11.	Click **Save**.	You can add multiple Small ROC/P records by clicking the **Add New** button and repeating steps 6-12.
12.	Click **Close** to return to the Main Menu screen.	
13.	Select **File, Logout** from the Main Menu screen to logout.	The Logon screen displays.
14.	Login as the *County JPA* user.	The Main Menu opens.
15.	From the **LEA** menu, select **School District**, and then select **Attendance** from the sub-menu.	
16.	Click the left-arrow in the **District(s)** grid for Butte Valley Unified.	

17.	Click the left-most column cell in the **Small High School ROC/P ADA/Service Allocation** row in the **Entry Screens** grid.	The Small High School ROC/P ADA/Service Allocation entry screen opens. A message displays that tells you if change the Attendance COE data, you must revalidate the Small High School ROC/P ADA/Service Allocation. If this is the first time you are entering data in this entry screen, a message displays reminding you to click the **Add New** button to add a new record. If there are records present, then you will not be prompted to add a new record.
18.	Click **OK** to close both message boxes.	
19.	Click the **Add New** button.	An **Add New Record** window displays. The **ROC/P** and **School District** drop-down list fields are disabled and display the selected ROC/P and district.
20.	Select a school from the **Small High School** drop-down list.	The selected school name displays.
21.	Click the **Add Record** button.	
22.	Enter numbers into each field, pressing the Tab→ key to move between fields.	Use any combination of numbers—if they are wrong, you will be able to view the corrections you need to make in the Edit Check Report.
23.	Click **Save**.	
24.	Click **Close** to return to the Main Menu screen.	
25.	Select **File, Logout** from the Main Menu screen to logout.	The Logon screen displays.

6.1.6 TASK: ENTER DATA IN THE HANDICAPPED ROC/P ENTRY SCREEN

☐ Objective: To enter Handicapped ROC/P data.

What you do	***Comments/Prompts***
1. Logon as the *County Office* user.	The Main Menu opens.
2. Select **Annual** from the **Period** menu.	
3. Click the left-arrow in the **County Offices of Education** grid.	
4. Click the left-most column cell in the **Handicapped ROCP** row in the **Entry Screens** grid.	The Handicapped ROCP entry screen displays.
5. Enter numbers into each field on the **Attendance/Expenditures** tab, pressing the Tab→ key to move between fields. Try using the period . key to apply decimal amounts to ADA.	Notice that you must enter ADA information in the first column of entry fields. You must enter dollar amounts in the second column of entry fields. **Note**: The expenditures column is only enabled in the annual period.
6. Click the **Save** button.	Notice the total of each column is displayed in Line A-4.
7. Click **Close** to return to the Main Menu screen.	
8. Select **File, Logout** from the Main Menu screen to logout.	The Logon screen displays.

Notes:

7.0 Lesson 6—Entering County Charter School Attendance

Lesson Objectives

To understand the County Charter Attendance entry screens, you will:

A Enter data in each of the County charter school attendance entry screens

7.1 ENTERING COUNTY CHARTER SCHOOL ATTENDANCE

7.1.1 TASK: ENTER DATA IN THE ATTENDANCE COUNTY OPERATED CHARTER SCHOOLS PROGRAM COE ENTRY SCREEN

☐ Objective: To enter Attendance County Operated Charter Schools Program COE data.

	What you do	*Comments/Prompts*
1.	Logon as the *County Charter* user.	The Main Menu opens.
2.	Select **P-2** from the **Period** menu.	
3.	Select **Charter School→Attendance** from the LEA menu.	Notice the rows of the Main Menu grids change as you select a different LEA.
4.	Select **Soledad Enrichment Action (Charter)** from the **Charter School(s)** grid by clicking the left-arrow of that LEA.	
5.	Click the left-most column cell in the **Attendance County Operated Charter Schools Program COE** row in the **Entry Screens** grid.	The Attendance County Operated Charter Schools Program COE entry screen displays. If this is the first time you are entering data in this entry screen, a message displays reminding you to click the **Add New** button to add a new record. If there are records present, then you will not be prompted to add a new record.
6.	Click **OK**.	
7.	Click the **Add New** button.	An **Add New Record** window displays.
8.	Select a county from the **County of Residence** drop-down list.	The selected county name displays.

9.	Select a district from the **District of Residence** drop-down list.	The selected district name displays.
10.	Click the **Add Record** Button.	
11.	Enter numbers into each field pressing the Tab→ key to move between fields. Try using the period . key to apply decimal amounts to ADA.	Use any numbers. If you click Check/Save and the data is wrong, you will be able to view the corrections you need to make in the Edit Check Report.
12.	Click **Save**.	Notice that the sum of the previous cells displays in the **Total ADA** (A-11) and **Classroom based Total ADA** (A-12) cells when you save the record. You can add multiple Attendance County Operated Charter Schools Program COE records by clicking the **Add New** button and repeating steps 7-12.
13.	Click **Close** to return to the Main Menu screen.	
14.	Select **File, Logout** from the Main Menu screen to logout.	The Logon screen displays.

7.1.2 TASK: ENTER DATA IN THE ATTENDANCE CHARTER SCHOOL BLOCK GRANT COE ENTRY SCREEN FOR A CHARTER SCHOOL THAT CEASED OPERATION

☐ Objective: To enter Attendance Charter School Block Grant COE data for a county charter school that ceased operation during the current fiscal year.

	What you do	***Comments/Prompts***
1.	Logon as the *County Charter* user.	The Main Menu opens.
2.	Select **P-2** from the **Period** menu.	
3.	Select **Charter School→Attendance** from the **LEA** menu.	Notice the rows of the Main Menu grids change as you select a different LEA.
4.	Select **Soledad Enrichment Action (Charter)** from the **Charter School(s)** grid by clicking the left-arrow of that LEA.	
5.	Click the left-most column cell in the **Attendance Charter School Block Grant COE** row in the **Entry Screens** grid.	The Attendance Charter School Block Grant COE entry screen displays. Note: The first field in the Elementary and High School tab is disabled for the Annual reporting period.
6.	Click the **Yes** radio button to show that the charter school ceased operation during the current fiscal year.	A "If you select Yes, days of operation must be reported" message box displays. Note: If the charter school ceased operation during the current fiscal year and you clicked the **Yes** radio button in this field for the P-1 or P-2 reporting period, you must enter data in the **Days of Operation** tab.
7.	Click **OK**.	The message box closes.

8.	Click the **Yes** radio button to show that the charter school is in its first year of operation.	
9.	Enter a date within the current fiscal year (for example: *10/10/2002*).	
10.	Enter numbers into each field on the **Elementary and High School** tab, pressing the Tab→ key to move between fields. Try using the period . key to apply decimal amounts to ADA.	Use any numbers. If you click Check/Save and the data is wrong, you will be able to view the corrections you need to make in the Check Edit Report. Notice that some fields in the tabs are disabled because the information does not apply.
11.	Click on the **Supplemental Instructional Hours** tab, and continue to add data.	Notice that on the Supplemental Instructional Hours tab, hours, not ADA, are entered.
12.	Click on the **Days of Operation** tab.	Unless you selected **Yes** in Step 6, the fields in this tab are disabled for P-1 and P-2.
13.	Select the **Multi-Track** radio button.	
14.	Select a track from the drop-down list.	
15.	Enter numbers into fields C-2 through C-12 on the **Days of Operation** tab. Try using the period . key to apply decimal amounts to ADA.	You must select either **Single Track** or **Multi Track**. You cannot enter data into both tracks. Notice the SBE Approved Waiver checkbox. Click this checkbox only if you have an approved waiver from the State Board of Education. Note: Field C-1 is for the single track option.
16.	Click **Save**.	

17.	Click the **ADA Allocation** button.	If this is the first time you are allocating ADA in this entry screen, a message displays reminding you to click the **Add New** button to add a new record. If there are records present, then you will not be prompted to add a new record.
18.	Click **OK**.	
19.	Click the **Add New** button.	An **Add New Record** window displays.
20.	Select a county from the **County of Residence** drop-down list.	The selected county name displays.
21.	Select a district from the **District of Residence** drop-down list.	The selected district name displays.
22.	Click the **Add Record** button.	
23.	Enter the ADA into the ADA fields. Try using the period . key to apply decimal amounts to ADA.	
24.	Click **Save**.	You can allocate ADA for multiple districts by clicking the **Add New** button and repeating steps 17-22.
25.	Click **Close** to return to the Attendance Charter School Block Grant COE entry screen.	
26.	Click **Close** to return to the Main Menu screen.	
27.	Select **File, Logout** from the Main Menu screen to logout.	The Logon screen displays.

7.1.3 TASK: ENTER DATA IN THE ATTENDANCE CHARTER SCHOOL BLOCK GRANT COE ENTRY SCREEN

☐ Objective: To enter Attendance Charter School Block Grant COE data for a county charter school that did not cease operation during the current fiscal year.

	What you do	***Comments/Prompts***
1.	Logon as the *County Charter* user.	The Main Menu opens.
2.	Select **Annual** from the **Period** menu.	
3.	Select **Charter School→Attendance** from the **LEA** menu.	Notice the rows of the Main Menu grids change as you select a different LEA.
4.	Select **Soledad Enrichment Action (Charter)** from the **Charter School(s)** grid by clicking the left-arrow of that LEA.	
5.	Click the left-most column cell in the **Attendance Charter School Block Grant COE** row in the **Entry Screens** grid.	The Attendance Charter School Block Grant COE entry screen displays. Note: The first field in the Elementary and High School tab is disabled for the Annual reporting period.
6.	Click the **Yes** radio button to show that the charter school is in its first year of operation.	
7.	Enter a date within the current fiscal year (for example: *10/10/2002*).	

8.	Enter numbers into each field on the **Elementary and High School** tab, pressing the Tab→ key to move between fields. Try using the period . key to apply decimal amounts to ADA.	Use any numbers. If you click Check/Save and the data is wrong, you will be able to view the corrections you need to make in the Check Edit Report. Notice that some fields in the tabs are disabled because the information does not apply.
9.	Click on the **Supplemental Instructional Hours** tab, and continue to add data.	Notice that on the Supplemental Instructional Hours tab, hours, not ADA, are entered.
10.	Click on the **Days of Operation** tab.	Note: The fields in this tab are disabled for P-1 and P-2 unless you indicated that the charter school ceased operation during the current fiscal year in the **Elementary and High School** tab.
11.	Select the **Multi-Track** radio button.	
12.	Select a track from the drop-down list.	
13.	Enter numbers into fields C-2 through C-12 on the **Days of Operation** tab. Try using the period . key to apply decimal amounts to ADA.	You must select either **Single Track** or **Multi Track**. You cannot enter data into both tracks. Notice the SBE Approved Waiver checkbox. Click this checkbox only if you have an approved waiver from the State Board of Education. Note: Field C-1 is for the single track option.
14.	Click **Save**.	
15.	Click the **ADA Allocation** button.	If this is the first time you are allocating ADA in this entry screen, a message displays reminding you to click the **Add New** button to add a new record. If there are records present, then you will not be prompted to add a new record.

16.	Click **OK**.	
17.	Click the **Add New** button.	An **Add New Record** window displays.
18.	Select a county from the **County of Residence** drop-down list.	The selected county name displays.
19.	Select a district from the **District of Residence** drop-down list.	The selected district name displays.
20.	Click the **Add Record** button.	
21.	Enter the ADA into the ADA fields. Try using the period . key to apply decimal amounts to ADA.	
22.	Click **Save**.	You can allocate ADA for multiple districts by clicking the **Add New** button and repeating steps 17-22.
23.	Click **Close** to return to the Attendance Charter School Block Grant COE entry screen.	
24.	Click **Close** to return to the Main Menu screen.	
25.	Select **File, Logout** from the Main Menu screen to logout.	The Logon screen displays.

7.1.4 TASK: ENTER DATA IN THE ATTENDANCE COE CHARTER SCHOOL - REVENUE LIMIT ENTRY SCREEN

☐ Objective: To enter Attendance COE Charter School - Revenue Limit data.

	What you do	***Comments/Prompts***
1.	Logon as the *County Charter* user.	The Main Menu opens.
2.	Select **Annual** from the **Period** menu.	
3.	Select **Charter School** from the **LEA** menu, then select **Attendance**.	Notice the rows of the Main Menu grids change as you select a different LEA.
4.	Select **Soledad Enrichment Action Charter School** in the **County Offices of Education** grid by clicking the left-arrow of that LEA.	
5.	Click the left-most column cell in the **Attendance COE Charter School - Revenue Limit** row in the **Entry Screens** grid.	The Attendance COE Charter School - Revenue Limit entry screen displays.
6.	Enter numbers into each field on the **Elementary and High School** tab, pressing the Tab→ key to move between fields. Try using the period . key to apply decimal amounts to ADA.	Use any numbers. If you click Check/Save and the data is wrong, you will be able to view the corrections you need to make in the Check Edit Report. Notice that some fields in the tabs are disabled because the information does not apply.
7.	Click on the **ROC/P, Adults and CalWORKS** and **Supplemental Instructional Hours and Other** tabs, and continue to add data.	
8.	Click **Save**.	

9.	Click **Close** to return to the Main Menu screen.	
10.	Select **File, Logout** from the Main Menu screen to logout.	The Logon screen displays.

Notes:

8.0 Lesson 7—Entering Taxes

Lesson Objectives

To understand the Tax entry screens, you will:

A Enter school district and county taxes.

B Copy taxes from P-1 to P-2.

C Enter miscellaneous funds.

8.1 ENTERING COUNTY AND SCHOOL DISTRICT TAXES

Because county offices and school districts require the same type of taxes (such as Secured and Unsecured) you can enter these taxes using the same entry screen but by selecting different tax "types."

The following steps will help you enter taxes for the correct LEA.

8.1.1 TASK: ENTER DATA IN THE TAXES ENTRY SCREEN

☐ Objective: To learn how to enter county and school district taxes.

	What you do	*Comments/Prompts*
1.	Login as the *County Auditor* user.	The Main Menu opens.
2.	Select **P-1** from the **Period** menu.	
3.	Click the left-arrow in the **County Auditor** grid.	
4.	Click the left-most column cell in the **Taxes** row in the **Entry Screens** grid.	The Taxes entry screen displays.
5.	Select **County** from the **Select TAX Type** drop-down list.	If this is the first time you are entering tax data for a county, a message displays reminding you to click the **Add New** button to add a new record. If there are records present, then you will not be prompted to add a new record.
6.	Click **OK**.	
7.	Click the **Add New** button.	You cannot enter data into the fields until you have clicked the **Add New** button.
8.	Select a county from the **County of Residence** drop-down list.	The selected county name displays.
9.	Select a COE from the **District of Residence** drop-down list.	The selected COE name displays.

10.	Click the **Add Record** button.	
11.	Enter whole numbers into each field.	
12.	Click **Save**.	Notice that the **Total** field (A-11) displays the sum of fields A-1 through A-10.
13.	Select **District** from the **Select TAX Type** drop-down list.	If this is the first time you are entering tax data for a school district, a message displays reminding you to click the **Add New** button to add a new record. If there are records present, then you will not be prompted to add a new record.
14.	Click **OK**.	
15.	Click the **Add New** button.	An **Add New Record** window will display.
16.	Select a county from the **County of Residence** drop-down list.	The selected county name displays.
17.	Select a district from the **District of Residence** drop-down list.	The selected school district name displays.
18.	Click the **Add Record** button.	
19.	Enter whole numbers into each field.	Notice that, depending on which county and district you choose, several fields are inactive because these taxes do not apply to your selection.
20.	Click **Save**.	Notice that the **Total** field (A-11) displays the sum of fields A-1 through A-10. You can add multiple district tax records by clicking the **Add New** button and repeating steps 15-20.

21. Add three more district tax records by repeating steps 15 through 20.	
22. Click **Close** to return to the Main Menu screen.	
23. Select **File, Logout** from the Main Menu screen to logout.	The Logon screen displays.

8.2 COPYING TAX DATA

Using the copy feature in the software, you can copy taxes from P-1 to P-2 for all the LEAs for which you entered P-1 data. You can also modify the copied data as needed.

8.2.1 TASK: COPY TAX DATA FROM P-1 TO P-2

☐ Objective: To learn how to copy taxes from P-1 to P-2.

	What you do	***Comments/Prompts***
1.	Login as the *County Auditor* user.	The Main Menu opens.
2.	Select **P-2** from the **Period** menu.	
3.	Click the left-arrow in the **County Auditor** grid.	
4.	Click the left-most column cell in the **Taxes** row in the **Entry Screens** grid.	The Taxes entry screen displays.
5.	Select **Copy P-1 to P-2** from the **Tools** menu.	The District List dialog box displays with the LEAs for which you entered data in P-1 displayed in the **P-1 Tax Data Captured** box. Note: If there is no P-1 tax data to copy, you will receive an error message.
6.	Click on an LEA in the **P-1 Tax Data Captured** box.	
7.	Click the > button.	The selected LEA displays in the **P-1 Tax Data to Copy to P-2** box.
8.	Holding the Ctrl key down, click on several more LEAs in the **P-1 Tax Data Captured** box.	
9.	Click the > button.	The selected LEAs are added to the **P-1 Tax Data to Copy to P-2** list.

10.	Click the >> button.	Notice that all the LEAs are now added to the **P-1 Tax Data to Copy to P-2** list.
11.	Click the << button.	Notice that all the LEAs move back to the **P-1 Tax Data Captured** box. Practice moving LEAs back and forth between the two boxes.
12.	Click the >> button to ensure that all LEAs are copied to the **P-1 Tax Data to Copy to P-2** list.	
13.	Click the **Copy Tax Data** button.	A message displays, showing that the copy operation has been completed.
14.	Click **OK**.	
15.	Click **Close**.	The District List window closes and you are returned to the Taxes entry screen.
16.	Select **County** from the **Select TAX Type** drop-down list.	The copied tax records and data display. Notice that you can select **District** from the **Select TAX Type** drop-down list and view the copied district taxes.
17.	Click **Close** to return to the Main Menu screen.	
18.	Select **File, Logout** from the Main Menu screen to logout.	The Logon screen displays.

8.3 ENTERING MISCELLANEOUS FUNDS

Miscellaneous Funds are entered for the COE and each of the school districts in the county at Annual.

8.3.1 TASK: ENTER DATA IN THE MISCELLANEOUS FUNDS ENTRY SCREEN

☐ Objective: To learn how to enter miscellaneous funds.

	What you do	***Comments/Prompts***
1.	Login as the *County Office* user.	The Main Menu opens.
2.	Select **Annual** from the **Period** menu.	
3.	Select **County Auditor** from the **LEA** menu, then select **Taxes** from the sub-menu.	
4.	Click the left-arrow in the **County Auditor** grid.	
5.	Click the left-most column cell in the **Miscellaneous Funds** row in the **Entry Screens** grid.	The Miscellaneous Funds entry screen displays. If this is the first time you are entering tax data for a county, a message displays reminding you to click the **Add New** button to add a new record. If there are records present, then you will not be prompted to add a new record.
6.	Click **OK**.	

7.	Click **Add New**.	An Add New Record window displays. Note: You cannot enter data into the fields until you have clicked the **Add New** button. Notice that the county name is already displayed in the County of Residence field. Notice that the County of Residence drop-down list is disabled. Miscellaneous Funds are only entered for the county chosen when you created your login account.
8.	Select a district from the **District of Residence** drop-down list.	The selected school district name displays.
9.	Click the **Add Record** button.	
10.	Enter whole numbers into each field.	
11.	Click **Save**.	Notice that the **Total** field (A-3) displays the sum of fields A-1 and A-2. You can add multiple miscellaneous funds records by clicking the **Add New** button and repeating steps 7-11.
12.	Click **Close** to return to the Main Menu screen.	
13.	Select **File, Logout** from the Main Menu screen to logout.	The Logon screen displays.

Notes:

9.0 Lesson 8—Edit Check Reports

Lesson Objectives

To understand Edit Check Reports, you will:

A Create, view, and correct data errors.

9.1 CREATE, VIEW, AND CORRECT DATA ERRORS

Throughout this training you may have encountered errors in the data you entered. In this lesson you will purposely create errors so you become familiar with the edit check process and correcting data errors. There are 2 types of errors: fatal errors (E) and warnings (W). Data with fatal errors cannot be exported. Data with warnings can be exported.

9.1.1 TASK: CREATE, VIEW, AND CORRECT DATA ERRORS

☐ Objective: To create, view, and correct data errors.

	What you do	***Comments/Prompts***
1.	Logon as the *County Office* user.	The Main Menu displays.
2.	Select **P-1** from the Period menu.	
3.	Select **School District** from the **LEA** menu and then select **Attendance**.	
4.	Click the left-arrow in the **District(s)** grid	
5.	Click the left-most column cell in the **Attendance School District** row in the **Entry Screens** grid.	The Attendance School District entry screen displays.
6.	Click **Delete**.	This will delete any previously saved data and give a clean slate to work with.
7.	Enter 5 for **Grades 9 – 12**.	
8.	Enter 0 for **Continuation Education**.	

9.	Click **Check/Save**.	The Edit Check Report displays. There are two messages that should appear. To diagnose the messages, the first field is the Line Number of the message. The second field displays which column. In this case, “B” is listed indicating the second or **High School** column. The third column is the field caption, which is displayed on the screen. The fourth field is the type of message, “E” for error and “W” for warning. The fifth column is the message. In this case, we have two messages, a warning and an error.
10.	Click the ☒ button to close the window.	
11.	Enter 5 for **Grades 9 – 12**.	
12.	Enter 5 for **Continuation Education**.	
13.	Click on **Other** tab.	
14.	Enter a 5 in field D-5, **High School** column.	
15.	Click **Check/Save**.	“The data has passed the edit check process” message displays.
16.	Click **OK**.	
17.	Click back on the **Regular Elementary and High School ADA** tab.	
18.	Enter 3 for **Continuation Education**.	
19.	Enter 0 for **Grades 9 – 12**.	
20.	Click **Check/Save**.	The Edit Check Report displays with a warning.

21.	Click the ☒ button to close the window.	
22.	Enter 0 for **Continuation Education**.	
23.	Enter 3 for **Grades 9 – 12**.	
24.	Click **Check/Save**.	The Edit Check Report displays with a different warning.
25.	Click the ☒ button to close the window.	
26.	Enter 0 for **Grades 9 – 12**.	
27.	Click **Check/Save**.	“The data has passed the edit check process” message displays.
28.	Click **OK.**	
29.	Click **Close** to return to the Main Menu screen.	
30.	Select **File, Logout** from the Main Menu screen to logout.	The Logon screen displays.

Notes:

10.0 Lesson 9—Importing and Exporting Certified Data Files

Lesson Objectives

To understand the import process, you will:

A Import a certified data file from your hard drive.

B Export a certified data file.

10.1 IMPORTING A CERTIFIED DATA FILE

For purposes of this training guide, you will learn how to import a certified data file from a specific LEA. For other importing functionality, please refer to *Lesson 9—Exporting & Importing* in the *2002-03 Attendance Software Training Guide* for further information.

10.1.1 TASK: IMPORT FROM A CERTIFIED DATA FILE

☐ Objective: To import data from a Certified Data File.

	What you do	***Comments/Prompts***
1.	Logon as the *County Office*.	The Main Menu opens.
2.	Select **P-2** from the **Period** menu.	
3.	Select **Import** from the **File** menu, and then select **Certified Data**.	The Importing Certified Data screen opens.
4.	Click the **Select File** button.	The Open file dialog box opens.
5.	Select the file from the **CountyLoginImportTest** folder on your installation CD.	
6.	Click **Open**.	If there are already records in the database for the LEA and program you are importing to, a message box will appear that asks whether you want to overwrite the existing data. If this occurs, click **Yes**. The file is imported and the status window displays. Note: The program(s) must have data and no fatal errors to be imported. Warnings are OK. If the import process fails, a message box will be displayed.
7.	Click **Close**.	The status window closes.
8.	Click **Close**.	The Importing Certified data screen closes and the Main Menu is displayed.

9.	Select **Charter School** and then **Attendance** from the **LEA** Menu.	
10.	Select any Oakland Unified School District in the **Charter School(s)** grid.	Notice that the Entry Screens grid displays records. These are the records from the certified data file you imported from Step 6.
11.	Select **File**, **Logout** from the Main Menu screen to logout.	The Logon screen displays.

10.2 EXPORTING A CERTIFIED DATA FILE

You can export data for all LEAs and entry screens or you can select individual LEAs and entry screens.

For purposes of this training guide, you will learn how to export a certified data file for all programs within the County Office. For other exporting functionality, please refer to *Lesson 9—Exporting & Importing* in the *2002-03 Attendance Software Training Guide* for further information.

You must export certified data before you can print a COE Certification or upload files to the CDE.

10.2.1 TASK: EXPORT TO A CERTIFIED DATA FILE

☐ Objective: To export to a certified data file.

	What you do	***Comments/Prompts***
1.	Logon as the *County Office*.	The Main Menu opens.
2.	Select **Export** from the **File** menu, select **Certified Data**, and then select **All**.	The Data modification window displays.
3.	Change the radio button to the right of question number one (1.) to “**Yes**”.	A message box displays.
4.	Click **OK**.	The message box closes, and the cursor focus shifts to the Comments field.
5.	Type “Test” in the Comments field.	
6.	Repeat Steps 6-8 for questions number two (2.), three (3.), and four (4.) in the window.	
7.	Click **OK**.	A certification language message box appears.

8.	Click **OK**.	Note: The program(s) must have data and no fatal errors or they cannot be exported. Warnings are OK. The **Last Modified** date cannot be later than the **Last Edit Check** date. Data is exported and a Status window displays the results of the export process.
9.	Click **Close** to return to the Main Menu screen.	
10.	Select **File**, **Logout** from the Main Menu screen to logout.	The Logon screen displays.

Notes:

11.0 Lesson 10—Printing County Reports

Lesson Objectives

To understand COE reports, you will:

A Print a Status Report from the Main Menu.

B Print a COE Certification Report from the Main Menu.

11.1 PRINTING REPORTS

When you logon as a County user, the **File** menu (on the Main Menu screen) contains print commands only available to a COE. For information on printing other reports, please refer to *Lesson 10—Printing Reports* in the *02-03 Attendance Software Training Guide*.

The Status Report displays all the school districts, any charter schools within the school districts, and the programs for which you have data. The Status Report also allows you to quickly view the school districts , charter schools, and auditors/superintendents from whom you need to receive attendance data.

The COE Certification prints after you have exported a certified data file.

11.1.1 TASK: PRINT A STATUS REPORT

☐ Objective: To print a Status Report.

	What you do	***Comments/Prompts***
1.	Login as the *County Office*.	The Main Menu displays.
2.	Select **P-2** from the **Period** menu.	
3.	Select **Print** from the **File** menu and then select **Status**.	The LEA Status Report window displays. Notice the list of School Districts, Charter Schools, and County Schools in the report.
4.	Examine the report.	Notice that some of the grid squares on the report display the number 1 in them, while others are blank. Discuss the results of the report as a group.
5.	Using the arrows on the bottom of the screen, click to the last page of the report.	Notice that the legend at the end of the report displays the names of the programs for further information.
6.	Close the report.	
7.	Select **File**, **Logout** from the Main Menu screen to logout.	The Logon screen displays.

11.1.2 TASK: PRINT A COE CERTIFICATION

☐ Objective: To print a COE Certification.

	What you do	***Comments/Prompts***
1.	Login as the *County Office*.	The Main Menu displays.
2.	Select **P-2** from the **Period** menu.	
3.	Click the **Selected** column cell of the LEA and change it to "Yes"	
4.	Click the left-arrow of the LEA to activate the **Entry Screens** grid.	
5.	Click the **Selected** column cell of one or more programs in the Entry Screens grid to change the cell to "Yes".	
6.	Select **Print** from the **File** menu and then select **COE Certification**.	The certification report is sent directly to the printer and the Status window displays.
7.	Click **Close**.	
8.	Select **File**, **Logout** from the Main Menu screen to logout.	The Logon screen displays.

Notes:

12.0 Lesson 11—Uploading Data to the CDE

Lesson Objectives

To understand the upload to the CDE process, you will:

A Upload a certified file.

12.1 UPLOADING CERTIFIED FILES TO THE CDE

After you export your file to a certified data file, you must send the certified file to CDE via File Transfer Protocol (FTP), or by email. Additionally, the County Superintendent must sign the Certification Letters submitted from their district(s) and/or charter school(s) and keep them on file.

The FTP process, for users familiar with FTP, is the most reliable transmission method. The Attendance Software-County Logon Supplement software contains an FTP component.

Email may also be used. However, it is important to note that your email server may have limitations on the size of any attached files. If the file size is larger than allowed, you may need to use Winzip or a similar product to compress the files. Refer to your e-mail software documentation for instructions about how to attach files to e-mail.

12.1.1 TASK: UPLOAD CERTIFIED DATA

☐ Objective: To upload a certified data file.

	What you do	*Comments/Prompts*
1.	Login as the *County Office* user.	The Main Menu opens.
2.	Select **Upload Certified Data** from the **Tools** menu.	The Submit Datafile entry screen displays.
3.	Click the **Advanced** button.	Notice the **FTP Configuration** fields. These do not need to be changed during training but you may find that the defaults require modification from your office computer.
4.	Click the **Cancel** button.	The FTP Configuration fields “roll-up”.
5.	Click the **Select File** button.	The Select Datafile to Submit window opens to the Export folder.
6.	Select the file previously exported in Lesson 10.2.1 and click **Open**.	The file immediately begins uploading to the CDE server, where it is stored for the apportionment.
7.	Click **Close** to return to the Main Menu.	

8.	Select **File**, **Logout** from the Main Menu screen to logout.	The Logon screen displays.

Notes: